

MAIL TO:
Office of the Attorney General
Registry of Charitable Trusts
P.O. Box 903447
Sacramento, CA 94203-4470

STREET ADDRESS:
1300 I Street
Sacramento, CA 95814
Telephone: (916) 323-5079

WEBSITE ADDRESS:
<http://ag.ca.gov/charities/>

FUNDRAISING COUNSEL FOR CHARITABLE PURPOSES ANNUAL REGISTRATION FORM FOR 20____

Section 12599.1, California Government Code
11 Cal. Code Regs. section 308

Failure to register by January 15TH annually for each calendar year of solicitation
may result in late fees as defined in Government Code section 12586.1.

A CERTIFIED OR CASHIER'S CHECK IN THE AMOUNT OF \$350
MUST ACCOMPANY THIS REGISTRATION FORM



Official Name and Address of Fundraising Counsel for Charitable Purposes

Name of fundraising counsel for charitable purposes

Address (Do not use P.O. Box)

City or Town, State and ZIP Code

Fundraising Counsel For Charitable Purposes:

Registration Number _____

Federal Employer I.D. Number _____

Telephone Number () _____

Mailing Address (If different from official address):

Mailing address

City, State, and ZIP Code

In addition to the OFFICIAL name, enter all other names and addresses under which this fundraising counsel for charitable purposes is known or operates:

Legal form of fundraising counsel for charitable purposes:

☐ Corporation

☐ Unincorporated Association

☐ Partnership

☐ Sole Proprietorship

State in which organized _____ Date organized _____

Enter name, individual home address, and relationship to the fundraising counsel for charitable purposes of each officer and director of corporation or unincorporated association, each partner in the partnership, or the owner of the sole proprietorship.

Name	Home Address	Title/Relationship to Fundraising Counsel for Charitable Purposes

Provide the name and address of each “individual, corporation, unincorporated association, or other legal entity” for whom the fundraising counsel for charitable purposes has performed any services described in Paragraph (1) of subdivision (a) of section 12599.1 during the preceding calendar year.

Name	Address

Is any director, officer, or employee of the fundraising counsel for charitable purposes a director, officer, or employee of any charitable organization with which it has contracted to provide services?

☐ Yes ☐ No

If “Yes,” complete the following:

Name and address of director, officer, or employee of fundraising counsel for charitable purposes	Name and address of charitable organization	Relationship of officer, etc. to charitable organization

For each affiliation identified above, attach a copy of the contract between the fundraising counsel for charitable purposes and the charity.

Has the fundraising counsel for charitable purposes ever had any license, registration or permit denied, cancelled, suspended or revoked, or had any official disciplinary or legal action taken against it? Is any such action currently pending against the fundraising counsel for charitable purposes or any of its representatives in relation to any fundraising activity?

☐ Yes ☐ No

If “yes,” attach information stating the name and address of the government agency bringing the action, the status or disposition of the action, and the date of the action.

I certify under penalty of perjury that _____ had a written
(Insert name of fundraising counsel for charitable purposes)
contract with each individual, corporation, unincorporated association, or other legal entity listed above and that the contract contains the following provisions:

- (1) The legal name and address of the charitable organization as registered with the Registry of Charitable Trusts unless the charitable organization is exempt from registration.
- (2) A statement of the charitable purpose for which the solicitation campaign is being conducted.
- (3) A statement of the respective obligations of the fundraising counsel and the charitable organization.

- (4) A clear statement of the fees and any other form of compensation, including commissions and property, that will be paid to the fundraising counsel.
- (5) The effective and termination dates of the contract and the date services will commence with respect to solicitation in this state of contributions for a charitable organization.
- (6) A statement that the fundraising counsel will not at any time solicit funds, assets, or property for charitable purposes, receive or control funds, assets, or property solicited for charitable purposes, or employ, procure, or engage any compensated person to solicit, receive, or control funds, assets, or property for charitable purposes.
- (7) A statement that the charitable organization exercises control and approval over the content and frequency of any solicitation.
- (8) A provision that the charitable organization has the right to cancel the contract without cost, penalty, or liability for a period of 10 days following the date on which the contract is executed; that the charitable organization may cancel the contract by serving a written notice of cancellation on the fundraising counsel; and that, if mailed, service shall be by certified mail, return receipt requested, and cancellation shall be deemed effective upon the expiration of five calendar days from the date of mailing.
- (9) A provision that, following the initial 10-day cancellation period, the charitable organization may terminate the contract by giving 30 days' written notice; that, if mailed, service of the notice shall be by certified mail, return receipt requested, and shall be deemed effective upon the expiration of five calendar days from the date of mailing; and that, in the event of termination under this subdivision, the charitable organization shall be liable for services provided by the fundraising counsel to the effective date of the termination.

Signature

Printed Name

Title

Date